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Chpt. 2

What we need to know about learners



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Chapter 2

What We Need to Know about Learners

This chapter concerns itself with the way in which the learning styles of a group of learners will exert a general influence on what goes on in a training session. It looks at the way in which the specific characteristics of adult learners should influence, but not dictate, the behavior of learners and trainers. Finally, in doing so it looks at the ways in which a broad spectrum of learning theories can be used to plot the general course of a training session.

There are obviously many things about an audience that will be important to a trainer. Some of the information needed to prepare and run a successful training session can be gathered as part of the process of "breaking the ice" (see chapter 9) at the start of an event. Before this, we are clearly interested in finding out what the participants already know, and what kinds of experience they might be able to bring to the learning. As the event unfolds, we will discover more and more items of information that are valuable, and which might lead us to modify our training approach and content. Other pieces of information will come from the state of our knowledge of how people learn. We can be sure that we will be faced with a complex and varied set of preferences and learning skills: About these we can generalize, from our knowledge of learning theories.

There is no need to become enmeshed in the complexities of learning theory: Most of it can be explained simply, and this is certainly true of what a trainer will need to be armed with in order to negotiate a practical training session with success. How simply is shown by the next case study, that has the virtues of being short, to the point, and relevant.

Case Study 1

“Out of The Mouths of Babes and Sucklings”

The Situation

Some years ago, a lecturer visited a well-known resource center that served a large number of schools in a capital city. The visit coincided with a visit of a class from a local school. While touring the center with the director, the lecturer struck up a conversation with a young boy who was searching for material on volcanoes, in order to complete a project. The boy had an array of reference works and other texts spread out before him, and was busily making notes from an encyclopedia. The lecturer suggested to the boy that other information might be found in other sources, and the boy agreed. The conversation continued, with the lecturer pointing out that for a topic like volcanoes, visual material was at a premium, and in turn pointing the boy towards some useful 35mm slide sets, films, and videos. The boy concurred with each suggestion until the lecturer mentioned some teaching kits displayed in a corner of the room. To this final suggestion the boy responded with: “Listen, mister. You have it your way, and I’ll have it mine.”

Comment

Extended comment is unnecessary, but it is a lesson well learned. The boy was of course right. To the lecturer it was natural to look for visual material, yet the boy was more comfortable using verbal descriptions. In a good training session there will be features that make it possible for everybody to have a little of their own way, as well as a little of the ways of other people.

What is also true is that adult learners learn through complex multiple processes that cannot be completely explained by any one theory. There is, as stated earlier, a very broad spectrum of learning theories. Each one makes some contribution to solving the basic problem of understanding how adults learn.

There are some basic principles that I would argue are crucial to this appreciation of how the people sitting in front of us are going to interact with the learning opportunity presented by the trainer, and with the trainer him- or herself. These rules also help to explain one of the basic premises of training, set out in chapter 1, which was that whatever can be drawn out of the participants, whether it is ideas, beliefs, or concrete experience, is as valuable as whatever the trainer puts into the process. Ideas coming from Andragogy—“the art and science of helping adults to learn” (Knowles, 1990)—may well therefore explain much, but they will not explain everything.

This issue also has to be viewed in the context of the nature of the practical training that occurs in modern organizations. Composed of comparatively short episodes; presenting ideas and processes succinctly; lacking the time, and indeed without the need, for extensive theorizing; working with immediate learning needs; balancing overall the needs of the organization and the personal development needs of learners; work-based and often delivered at the workplace rather than in formal training or classroom situations; sometimes carried out by people without conventional training skills; often provided by peers and immediate workmates.

I would also have to add that as well as not needing much theory, participants in training do not *like* much of it either. This writer’s obsessive interest in theory has been commented on before, sometimes unfairly and sometimes erroneously. Even so, in practical terms it has been a useful discipline to remember this point. It also leads to the second of the golden rules referred to later, that excessive theorizing must be avoided. Attentive readers will note that this tends to contradict the first golden rule, that trainers should not compromise in the presentation of ideas that might be complex. Nor should they commit the crime of condescension, and talk down to an audience.

The other factor that affects the trainer’s approach is the psychological condition of the learners. Their states of learning competence and motivation will be varied. Even though the motivation of adult learners is strong, the levels of motivation of individuals in any training group will be different, their perception of the relevance of the sessions will contrast, and their general willingness to learn will vary. In preparing the learning material, and in planning and conducting the session, there are a number of guidelines that will help the trainer deal with the problems of motivation, readiness to learn, commitment, and understanding. More important, they will help the trainer to make him- or herself clear to the participants.

Some Golden Rules

Do Not Compromise

It is **undoubtedly true** that many learners do not want to engage too heavily with theory. Given the timescale of most training courses, and the fact that training is not usually conducted at the level of undergraduate study in any case, this is an advantage to the learner and the trainer. On the other hand, most kinds of training will fail if they do not engage with a small degree of theory, and it is crucial that the ideas behind things are presented clearly and succinctly. Learners will also benefit from the chance to make connections between their own experience and novel propositions that might be put to them for the first time in training sessions. So, when training material is being prepared, two things should be done:

- Always assume that the learners will cope with complex ideas.
- Then communicate them in the simplest possible way.

Avoid Over-theorizing

Theory used in training sessions should be simplified. One of the greatest talents a trainer can possess is that of putting complex ideas in simple ways. One of the most fertile breeding grounds for this skill is working with groups in different environments, where there might be language and cultural differences, and maybe the need to work through an interpreter. Preparing and delivering training in these kinds of environments will hone this ability to present theory as simply as possible:

- Be absolutely sure that the theory is relevant to practical situations.
- Demonstrate this practical relevance.
- Use the KISS (see page 15).

Challenge Yourself and Them

Keeping things simple and relevant to working situations are basic rules, but they are not always easy ones to follow. This means that:

- For content and presentation, you set yourself the highest standards

of preparation and delivery.

- For the group as a whole, set them objectives that will stretch them.

KISS

This is not my phrase, of course, and is variously described as "Keep It Short and Simple" or "Keep It Simple, Stupid!" I have heard it in many situations from the training of marine radio operators to basic research techniques for business researchers. The acronym should be the watchword of all trainers. The preparation process has to contain within it a systematic approach to writing, editing, reviewing, and practicing that will ensure that what comes out is the essence of the topic (see chapter 3). When it is delivered, this will guarantee that if it is necessary to present difficult ideas they will be simply put. It makes for better understanding, and a brevity of communication that does not allow participants to lose interest. It should also ensure that whatever emerges from the trainer's mouth will be as logical, simple, to the point, and clear as it can possibly be. What is more, simplicity in thought and expression will help put in place a structure that learners can understand and follow. Keeping this proposition in mind will avoid many of the problems of practical delivery—creating interest, maintaining interest, winning cooperation, and ensuring understanding and relevance. Last of all, and related to everything that has been said before, it helps to avoid over-theorizing.

Give Them the Session

Within reason, the learners should own the exchange between the trainer and themselves. "Within reason" are the key words. Most readers will have come across training sessions that have been hijacked by the combination of a participant preoccupied with a particular problem and a trainer who loses control of the process. All training takes place within a framework that should take into consideration organizational needs, individual needs, ambitions, and aspirations. The means of establishing these parameters are outside the remit of this book, but there are a number of texts that clearly set out the issues. The book by Buckley and Caple (2000) is one good example of many. In the training session itself, there is room for learner choice without damaging the integrity of the learning or the achievement of objectives agreed by all the stakeholders.

The Learner

I hope it is now clear that this is not a book about theory, but referring to it now and again is inevitable and unavoidable, and this is one of those times. Although much of the theoretical emphasis in modern training comes from what might be called non-traditional theory, including in particular Andragogy and other ideas of later 20th century experts, almost the whole panoply of learning theory has something of value to say about the interchange between trainer and learner.

Paradoxically, we will start with the work of Peter Honey, whose ideas have developed from the late 60s into the 21st century, and form the basis of material that is widely used by trainers.

Styles of Learning

There are many academic treatments of this area, and Reece and Walker's work, now in its fourth edition (2000) is an overview of the entire area of teaching and learning, providing a good bridge between theory and practice.

Various experts have advanced the idea of various kinds of intelligence:

- Verbal—when there is a preeminent style of discussing, explaining and debating
- Logical—implying analysis, reasoning, thinking sequentially, being able to categorize
- Spatial—where learners are good at seeing relationships, and like working with detail
- Kinesthetic—using body language well, preferring active forms of learning like role play or learning by doing
- Interpersonal—showing strength in negotiation, listening, influencing, and learning through problem-solving and group learning
- Intrapersonal intelligence—people who prefer learning alone, often by reading something, and can often find it easy to set their own learning goals.

The American psychologist Howard Gardner also considered learning styles to cover a very broad canvas embracing all of the above, and some others in addition (Allan, 2000). This reinforces the need for the trainer to use material and activities that appeal to a wide range of learning styles.

Coming from this consideration of the different kinds of intelligence, the idea of learning styles has an impeccable pedigree. There is an extensive literature that attempts to describe and analyze the phenomenon. There have also been a number of writers who have objected to the idea that it is possible to match learning styles—the ways learners approach a learning task—with teaching styles—the ways a teacher or trainer will present the learning. McInerney and McInerney (1998) suggest that the best strategy is to deploy a variety of learning styles in order to cater for individual differences between learners. This is what most trainers try to do in any case, and indeed it is the logical conclusion of most of the work on learning styles. The obvious point is that any group of people we work with will have different ways of approaching learning. If they are to get the best out of a learning experience, this experience has to be constructed in a way that does three things:

- It has to allow people to work at least for some of the time in ways that match their preferred and dominant learning styles.
- It has to introduce them to other styles that they might be less comfortable with, but nevertheless may be more appropriate for some kinds of learning experiences. One target of practical training, in this book at least, is to make learners as versatile as possible.
- It has to allow the trainer to vary the kind of learning experience or activity. Among other things, this is one of the easiest ways of introducing a change of pace into a training session (see chapter Five), and, by doing so, maintaining interest. It also allows learner choice.

As indicated, there are many examples in the literature, over many years, of taxonomies of learning styles. However, Peter Honey's work (Honey and Mumford, 1986) on preferred learning styles is a preferred reference point for me. It is a succinct and clear account of the theory, that suffers not at all through being easy to understand. Honey and Mumford identify four styles, and also offer a workable way of identifying preferred dominant styles, and styles that need to be strengthened in order to establish a balanced approach. What follows is drawn from their work.

Activists

Activists like to involve themselves in new experiences. They are open-minded, and this in itself tends to make them enthusiastic about anything new. They will try anything, but the downside is, obviously, that activists tend to act first and consider the consequences later. They tackle problems

by brainstorming. Gregarious by nature, they are willing to become involved with others, but very often they will prefer to see themselves as the focus of the activity.

Pragmatists

These are the learners who have a great curiosity about whether, and how, new ideas or techniques will actually work. Experimentation is one of their favorite ways of learning. They may not like discussion, and impetuosity can be a problem.

Reflectors

Reflectors will try to view things from all perspectives. They are observers, gatherers, and analyzers of data about experiences and events. Their downside is a tendency to postpone reaching definitive conclusions for as long as possible. Caution is part of their nature, and they are at their least comfortable in group activities like meetings and discussions. Their low profile is matched by good listening skills: they often have a slightly distant, unruffled air about them. Their actions are likely to be based on their perception of the big picture, including things that have happened in the past, and the views and assessment of others.

Theorists

Learners with this preferred style are happiest when they can develop theories in what is to them a logical and rational, if sometimes over-complicated, manner. They are good at building theories based on their own observations. Problem-solvers, they think logically and in a step-by-step way. Very often, they are good at developing a coherent overall picture out of something that possesses disparate elements. Perfectionists, they prize rationality, and tend to like models and systems thinking. Analysis and synthesis are their preferred ways of working. They also like to see things fit together in a tidy pattern.

The Practical Implications of Learning Styles

Many learners like to work together, and many like to work alone. Some of them want to stand back and think, others want to be at the center of any activity. Some lean heavily on theory, others want to try things in practice. There are learners who are logical in everything connected with learning, and others who are impetuous. Most learners are in fact a

mix of all styles, with a bias towards one or two. So are most trainers (see chapter 8 for a discussion of training styles).

Learners also bring to the task an equally broad mix of skills. There will be good listeners, organizers, analyzers, problem-solvers, learners who can see the big picture, learners who like detail, and, dare I say it, learners who like theory.

Without taking a mechanical approach to this issue, trainers need to cater for all of these characteristics. A general ability in this area is important, because some learning tasks are better accomplished through using certain learning styles than using others. Training in skills calls for demonstration, questioning, and hands-on practice. Yet skills training can also benefit, in almost every case, from some of the methods associated with training in topics that require understanding. Training that has attitude change as one of its objectives can usefully include role play, discussion, and case studies. Discussions, questions, comparisons, and problem-solving will be relevant to training aimed at creating understanding.

None of this is prescriptive, nor does it point to a rigid scheme for learning. I would argue, for example, that skills training will always benefit from the use of questioning techniques, and any kind of adult learning experience should capitalize on the great strength of peer learning.

From the trainer's point of view, a variety of learning experiences is also important because it maintains interest and sustains motivation.

Action Points

- If time permits, make space at the start of a session to find out what the preferred learning styles are.
- If there is no time to do this, make some, by distributing a brief questionnaire before the session starts.
- Build this information into the training strategy. Trainers need to become experts at thinking on their feet, and no training session should be approached without a bank of different kinds of material, group and individual exercises. These can be deployed when required.
- Remember also that while planning and preparation are everything, so is the willingness and the ability to change direction. Plan to change the plan!
- Make the results of the information-gathering exercise a learning experience. Discussion of individual differences in learning styles is legitimate, and can be used to improve the learning process.

- Remember that questioning is one of the most important techniques of the trainer, and begin by demonstrating its proper use as a means of establishing the knowledge, attitudes, and ideas of the group.

Learning Activities

Preferences in learning styles are obviously reflected in learning activities. Reece and Walker (2000) indicate that the learning strategies most favored by mature students are group work, games, and simulations. As expected, lectures come lower on the list, while case studies are, perhaps surprisingly, lower still. Other techniques such as problem-solving, peer learning, or learning from work, observation, and self-learning also carry particular significance for training.

So far, this chapter has set out two guiding principles for drawing up a learning or teaching strategy:

- Match the approach to the known learning styles of the participants, with due attention paid to the need to add breadth and variety to their approach to learning.
- Make sure that the learning activities are also consistent with this need for variety.

The General Characteristics of the Learner

We have generalized about activists, pragmatists, reflectors, and theorists in order to develop some ideas that will help a trainer decide on the best delivery strategies for a training session. Some more detailed guidelines can be drawn up from studying the way in which our thinking about the nature of the adult learner in particular has developed.

Pugh (2001) based on Knowles (1990), defined Andragogy as "helping adults to learn" and isolated some of the main characteristics. Although Knowles' views are not entirely shared by all critics, practical experience and good, old-fashioned common sense may well confirm that his key features have made a significant contribution to the understanding of how adults learn. Whether or not they are as distinctive as Knowles argues is not really relevant. His major characteristics are:

- The use of life experience as a learning resource

- The value of problem-solving
- The usefulness of participative techniques
- The ability to relate and apply learning to job or life situations
- A continuing desire to improve performance
- An acceptance that it is never too late to learn
- A stronger motivation than is found in younger learners
- That learning is a social process, taking place in equal relationships more than skills transmission: it is bound up with developing the whole individual and changing attitudes as well as behavior
- The idea that learners will be willing and able to exercise some control over their own learning, set their own goals, and share in the learning of others in the group.

Translated into the practical delivery of training, these characteristics mean a number of things. The next case study compares three situations encountered in real-life training, in order to illustrate those features in the makeup of the learner that will influence a practical training session.

Case Study 2 Going Off the Rails—and Sticking to the Brief

The Situation

An external facilitator was engaged to run an introductory workshop on team building. During the initial familiarization period, one of the participants indicated that his relationship with his line manager was fraught with major difficulties. The facilitator identified this as a major issue, although it only affected one person, and had no real bearing on a topic that had been carefully planned as part of a coherent staff development program.

Consequently, the rest of the day was given over to an examination of the issue of the relationship between one individual and the relevant line manager. At the end of the workshop the facilitator met with the director

of staff training and gave a verbal report of what she had done during the day. When the assessment forms came in, most of the participants were caustic about what they saw as a clear failure on the part of the trainer. The planned program had been jettisoned on the say-so of one individual. None of the learning objectives had been achieved. From the point of view of the training manager who had paid for the event, it had been a useless exercise, and a waste of money. Not least, the organization followed a policy of selling places on their training program to other companies, and the failure of this single event led to sharp comments from this direction also. The facilitator concerned never worked for the organization again.

These events can be compared with the second incident, that took place in a not-for-profit organization that was about to replace its free-to-client services with services that were to be charged for. A trainer from a small training partnership was engaged to work through the new financial system with the staff responsible for running it. The first event was with a group of staff who would be working with the client accounts, and actually computing, leveling, and collecting the charges.

The introductory session took an unexpected turn when the trainer was faced with a barrage of criticism from the entire group of learners. Their target was not the proposal to change to a fee-paying basis as such, but the manner in which the change had been introduced—a general lack of consultation, and, in particular, a failure to consider the views of the people who would be responsible for the practical operation of the new system. This was linked with what appeared to be a dismissive attitude to their experience and knowledge.

The trainer reacted by carefully noting each issue raised by the group, and then gave an assurance that the concerns about the implementation of the change would be passed on to management. She then continued with the planned program. At the end of the day the participants agreed that their experience had been positive and worthwhile. It was a contribution that had in fact alleviated some of their worries.

The trainer's evaluation of the day referred directly and specifically to the problems raised by the learners. A number of constructive criticisms were made, and a range of options to deal with the situation were set out. Management expressed its appreciation of the course of action taken.

The third incident occurred in a nongovernmental organization (NGO) that was seeking to develop the financial management skills of a group of middle managers. The three-day workshop was nearing the end of a conventional and uneventful first morning when the trainer began to realize

that beneath the surface there lay a substantial difficulty that was actually going to make the training irrelevant. To all intents and purposes the organization had no finance to manage. During the lunch break, the trainer worked to reorganize his plans, and began the afternoon session by pinpointing what he saw as the difficulty. The group agreed, and over the next two and a half days the previously agreed program was modified to deal with the precise identification of the difficulty, followed by a number of intensive sessions of problem-solving, brainstorming, group work, and case studies drawn from the experience of the trainer. After the preparation of an action plan to increase funding, the workshop ended with conventional financial management, to the acclaim of the participants.

Comment

Sharing Control

This is one of the difficulties referred to earlier in the chapter. Training takes place within a negotiated and understood framework, and to move outside this is dangerous, whatever is said about learner control and choice. The danger is illustrated by the first part of the case study.

Shared control, or "negotiated learning," takes place largely before the event. In an orderly and enlightened training world, the very presence of a group of people at a training session hopefully implies that there has been a discussion, an acceptance of a shared need on the part of the organization and the learners, and agreement on the relevance of the event to the personal and professional needs of the learners. The trainer has been careful in the selection of material, has devised a sensible sequence, and has chosen the learning experiences so that they form a relevant and comprehensive approach to learning styles. The approach allows the use of prior experience, the expression of varying points of view, and matches the learning objectives, so there will be scope for participation. This is what creates the "mutuality of planning" that commentators refer to. It is continued after the event, through the evaluation process.

There has to be a good reason before a trainer disturbs this carefully crafted balance. In the first example, the trainer's reaction constituted a derogation of duty. The need for learning, the agreed objectives, and the motivation that must have existed in order to persuade the learners to attend, were shattered. Control of the training has to be mutual: unilateral actions are damaging.

The actions of the trainer in the second example were exemplary. The

objections raised were real, but not strictly relevant to the matter in hand. The trainer had a clear responsibility to identify, and deal with, the concerns of the group, while at the same time meeting the agreed training need. Both the outcomes were satisfactory: the immediate objectives of the training session were realized, and the concerns of the staff were conveyed to management in a nonconfrontational way.

The final instance was a little more problematic. The organization had clearly identified a need for training in financial management, and the trainer and the group had together identified a major issue in the economic situation faced by the organization. This threatened the success of the session on financial management, so the relevance of the one to the other was clear. Only in circumstances like these is it wise to respond to concerns that will probably lead to the introduction of new objectives. Sharing, and the mutual ownership of learning, obviously has to be consensual. It is as much a matter for the judgment of the trainer as it is for the will of the group, as they are equal partners. The correct reaction for the trainer in the first example would have been to follow the same course of action as the consultant in the second case, and refer the problem that had emerged to management as a separate issue.

Self-set Goals

This is a related issue, also illustrated by the case study. The argument is that adult learners, that is, the people trainers work with, will not only be capable of taking a share in decisions about what is learned and how it is learned, but will also help to set their own objectives. Clearly, this occurred with the learners from the nongovernmental organization, who from their own experience were able to turn what might have been a less than satisfactory experience into a success.

Self-diagnosis and Prior Experience

Even the member of staff experiencing difficulties with the line manager in the first part of the case study was able to diagnose his own learning needs. He was also, but incidentally, able to diagnose the learning needs of his supervisor. In the second and third parts, there are simpler but more positive examples of groups of learners who were able to use their own experience of the working situation to help trainers arrive at a better understanding of what needed to be learned. The group in the not-for-profit organization were acutely aware of a failure of communication, a lack of ownership, and an inability to use the skills and experience of the workforce. They correctly considered the absence of these features to be

an obstacle to a major change proposed by management. In the case of the NGO, they were able to use their experience to improve the training event even before it had really started.

Relationships and Behavior: Learners and Trainers

Sharing control; setting goals together; diagnosing training needs together—these elements set the training process in a relationship that is much closer to equality than conventional teacher-pupil situations. If the process is based on the use of the experience and knowledge within the group, and if the group has a strong voice in deciding objectives, then there cannot be didactic trainer behavior. The task then is to apply the experience and the participation, and this means

- User-centered learning techniques as a means of applying and sharing experience and ensuring participation. The role of the trainer is to create the environment in which learning together in a spirit of equality becomes possible.

Action Points

The literature describes learning styles in various ways, and as indicated earlier there is some disagreement about the validity of the approach. For practical training, there are still some advantages to be gained from a general understanding of the issue. This set of action points begins with a caution:

- Do not consciously approach the preparation of a training session with a determination to put something in for everybody. If this is done, the result may be an inchoate mess that resembles a cheap sonnet lumiere presentation at a second-rate theme park. In any case, there is no trainer who is capable of successfully delivering a session that truly reflects all of the differences, nuances, and emphases in the ways in which people learn.
- An understanding of learning styles is necessary to build awareness of the differences likely to be present in the group that the trainer is dealing with. It is a safeguard against stereotyping learners, and against creating a uniform and monotonous training session.
- The differences between learning styles are also a timely reminder of the complexity of the training process in modern organizations.

Work on learning styles suggest that a training session should present the opportunity for learners to try things out, think about things, and consider the theoretical basis for what is being learned. It is therefore for the trainer to:

- Give learners the opportunity to exercise some responsibility over how they learn.
- Provide active and participative learning experiences. Participative learning means problem-solving, working in groups, allowing learners to make an input based on their experience, without large chunks of theory, as well as being made to think.
- Repeat and present the material in different ways. One of the best pieces of advice I was given as a neophyte lecturer was that the art of good teaching lay in saying the same thing twice, but in different ways. This is not only one of a number of ways of dealing with the fact that nothing worthwhile can be learned through seeing it or hearing it once only, but it also helps create a slower and more natural pace for the delivery of the material—a pace that makes it easier to learn things.

In this chapter I have tried to set out a blueprint. I hope it amounts to a set of principles that are intended as guides. It is worth saying that if this is regarded as a recipe to be slavishly followed in the preparation of a training session, then the training will probably fail. Training is an art as much as a science, and the things described here will help learners learn more effectively. On their own, or used as a checklist of ingredients that must be included, they will not be successful at all. The content of the chapter is best viewed as developing a broad strategy that is connective and learner-centered. The other component in this strategy comes from the way in which the content or material is treated. This is the theme of the second part of the book.

The Basic Principles Checklist

This checklist, like those that end most of the other chapters, has two purposes. It is an aide mémoire to the key ideas of the chapter, and it also helps the trainer develop a constructive attitude to a training session from the planning stages onward, carrying it forward into delivery.

1. Is the communication simple? How has this been achieved?
2. Is it short enough?
3. Are you confident that there is no over-theorizing?
4. Are you able to demonstrate the practical relevance of the theory you have included? How?
5. Are your objectives tough?
 - For yourself?
 - For the learners?
6. Have you created a partnership, with shared ownership of the training? How?
7. Does the event use a variety of learning styles?
8. Are you prepared to depart from the plan?
9. Do you have a bank of relevant material in reserve?
10. Are you ready to use the knowledge and experience of the group? How will you find out about these things?
11. Is the approach learner-centered? How have you achieved this?